

# J. WAYNE BURRITT

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Jonesborough, TN  
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## Skills

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Financial Analysis	Power BI	Git/GitHub
Forecasting, Planning & Analysis	Excel with VBA	Pandas
Budgeting/Modeling	Excel Power Query	Data Manipulation
Equity Analysis	Excel Power Pivot	Data Visualization
Credit Analysis	IBM Cognos Analytics	NumPy
Accounting	IBM Cloud AI	Data Cleaning
Financial Writing	Python	Jupyter Notebooks
Editing	SQL	Delteck Costpoint

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## Certifications

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Excel VBA & Excel Macros Certificate	Finance Fundamentals in Python Track
IBM Data Science Professional Certificate	Python and Machine Learning for Financial Analysis
IBM Applied Data Science Specialization	IBM Cognos Analytics 11 Cloud
IBM Introduction to Data Science Specialization	Bloomberg Equity Certification

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## Writing Portfolio

[burrittresearch.com](http://burrittresearch.com) | [medium.com/burrittresearch](https://medium.com/burrittresearch)

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## Data Science Portfolio

[burrittresearch.com](http://burrittresearch.com) | [datacamp.com/profile/burrittresearch](https://datacamp.com/profile/burrittresearch) | [kaggle.com/jonathanburritt](https://kaggle.com/jonathanburritt)  
[github.com/burrittresearch](https://github.com/burrittresearch)

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## Select Clients/Employers

Bank of America | Morgan Stanley | Weiss Research | Telesto Group  
The Street | Agora Financial | INO.com

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## Professional Experience

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**CEO and Financial Analyst/Writer, Burritt Research, Inc.**  
Jonesborough, TN

**2004 to present**

Launched and directed successful financial analysis, financial writing, and financial data analysis firm, driving the company from 0 to 31 clients. Clients include prominent players in investment management, defense, banking and financial publishing. Responsible for all aspects of the firm's operations including analysis, research, business development, financial control, marketing, and web design. Worked as both employee and subcontractor depending on client needs.

### Forecasting Planning and Analysis

- Designed, developed and maintained six VBA tools that improved financial forecasting and budgeting for \$50 million defense contractor in the IT software space. Reduced manual accounting and financial tasks by 75%.
- Scraped monthly income statement data from complex accounting reports for 15 major projects using VBA and transformed them into illuminating pivot-table driven solutions for project managers.

- Designed, developed and maintained two efficient UI user-from tools for data entry into large excel databases and applied VBA.
- Developed custom excel financial functions to automate and streamline mathematical and financial modeling. Reduced modeling time frames by 50%.
- Improved financial analysis workflows using IBM Cognos Analytics standard and customized reports.
- Designed, developed, and maintained database dictionaries that queried multiple excel files for keys and values and then returned data to large database.
- For \$25 million real estate developer, built and maintained property database. Then provided analysis and informative and interactive dashboards for ownership and senior management.
- Cleaned and wrangled financial income statement and balance sheet data into understandable and actionable monthly cash flow reports. Eliminated the industry-wide jargon associated with common cash flow statements.
- Leveraged outstanding financial writing and communication skills to deliver effective reports, blog posts, and presentations. Proficient at translating arcane and complex data problems into understandable and functional solutions.

### **Financial Data Analysis**

- Cleaned and wrangled structured and unstructured raw data into well-organized dataframes using python and python libraries, including pandas and NumPy. Used data standardization and data normalization to effectively prepare dataframes for analysis.
- Successfully leveraged IBM Db2, BigQuery and SQLite databases using python, including standard SQL queries as well as python magic functions for database queries such as SQLAlchemy. Routinely connected to a variety of data sources using a wide range of APIs as well as local file types, including csv and excel files.
- Effectively scrapped website and table data using standard python tools and libraries. Transformed this data into efficient dataframes and delivered insightful analysis.
- Successfully extracted location, venue, and user data from Foursquare location and geospatial data APIs. Cleaned and wrangled raw data into well designed dataframes and delivered valuable exploratory data analysis.
- Familiar with machine learning using python, including regression (simple, linear, and polynomial), classification (K-nearest neighbors, decision trees, support vector machines), clustering (K-means, DBSCAN), and recommendation systems. Worked with relevant python libraries, including scikit-learn and SciPy.
- Comfortable plotting data results using matplotlib, pandas plotting libraries, and folium maps.
- Experienced with Git, GitHub, versioning, and version control.
- Proficient using Jupyter Notebooks to design, develop, and manage python scripts and related markdown and html. Created informative and persuasive Jupyter Notebooks, full reports, and PowerPoint presentations.

### **Financial Writing**

- Created compelling, fresh, and insightful financial and investment content targeting a variety of topics, including U.S. and international equities, cryptocurrency and blockchain, equity options, currencies, commodities, global markets, and economics. Delivered this content across a robust array of platforms and formats, including frontend and backend investment newsletters, electronic investment magazines, investment websites, financial blogs, print financial magazines, and equity research reports.
- Created, launched, and directed all editorial aspects of multiple investment publications for a \$500 million internationally acclaimed financial publisher. Grew the frontend publication from zero

subscribers to 7,836 in just over a year. Served as editor and analyst for numerous clients' frontend and backend publications.

- Directed writing, marketing, and design services for existing and start-up investment websites. Managed or coordinated all aspects of design, content, and technology. Proven ability to work effectively with web designers, developers, and other technology team members.
- Delivered engaging content targeting digital marketing and business development goals, SEO best practices, and AP style requirements. Comfortable with a wide variety of social media platforms, including LinkedIn, YouTube, and Twitter.
- Drove investment content with cutting-edge, in-depth research and analysis. Supported that research and analysis with exemplary financial skill sets and tools, including economic, company and industry analysis, valuation models, financial projections, and cash flow analysis.
- Proven ability to deliver financial content and marketing messages across both video and audio. Deep experience in collaborating on producing a wide variety of media content.
- Exceptionally comfortable transforming arcane and obtuse financial topics into engaging, spirited, and action-oriented content.
- Consistently delivered exceptional results for a demanding financial services client base. Compiled an extensive list of superlative client testimonials.

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### **Education**

**Master of Business Administration** Golden Gate University, San Francisco, CA

**Bachelor of Arts in English & Philosophy** Indiana University, Bloomington, IN